



## **APPENDIX B**

### **1.1. Steps Required to Implement COD**

In the section below is a description of the detailed tasks in the COD Implementation Workplan found in Appendix A with an indication of which groups will need to be involved with completing the task -- SFA, Modernization Partner (MP), or the COD solution provider(s) (CSP) recommended in the 19.1.3 COD Preferred Solution Selection deliverable.

#### **1.1.1. Managing Phase**

The managing phase includes the organization of the IPT, the COD Project Team, and the on-going COD Project Management for the life of the project. It also includes the completion and evaluation of project tasks, documentation, and deliverables.

<b>ORGANIZE IPT</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Set Milestone Review Criteria	Set the checkpoints to review work with SFA in order to demonstrate the progress the COD project team is making toward successful completion of the project.	✓	✓	
Define Project Objectives	Define the objectives of the IPT in the development of the COD solution.	✓	✓	
Define Project Risks	Determine risks that can prevent the successful implementation of the COD solution	✓	✓	
Define Team Composition and Organization	Determine SFA personnel that will participate on the IPT .	✓	✓	
Incorporate Project Plan and Resources in Master IPT Schedule	Provide COD project plan to be included in Master IPT Schedule		✓	

<b>ORGANIZE COD PROJECT TEAM</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Develop Project Plan	The Project Plan will include components related to scope, effort, quality, risk, and time (schedule). It will be developed based on initial estimates provided by program		✓	✓



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ORGANIZE COD PROJECT TEAM				
Task	Description	SFA	MP	CSP
	management. Program management and other key stakeholders must approve it.			
Organize Project Resources/Set up Team Infrastructure	Includes tasks to organize project resources and equipment at the beginning of the project.		✓	✓

COD PROJECT MANAGEMENT				
Task	Description	SFA	MP	CSP
Coordination and Team Building with Key Stakeholders	Activities to ensure that key SFA stakeholders are aware of key aspects of the development of the COD solution.	✓	✓	
Measure Performance	This task is performed to capture actual performance data and calculate performance measures. Analyze any deviations from the Project Plan and trace them to their causes in a timely manner.		✓	
Manage Performance	This task is performed to manage project performance against the initial project estimates for effort, time (schedule), quality, and risk.		✓	
Report Project Status	Develop and submit weekly status reports. Conduct weekly COD team project status meetings.		✓	✓
Prepare for and Attend IPT Meetings	Preparation of materials for IPT meetings and time for team members to attend and present at IPT meetings.		✓	
Manage Issues and Risks	Communicate and resolve issues, and develop mitigation strategies for identified risks.		✓	
Manage Configuration/Versions of Deliverables	Put documents under configuration management and conduct Configuration Management audits.		✓	✓
Manage Quality Process	Perform Software Quality Assurance & CQMA reviews. Review developer work products and change control of software development documents.		✓	



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<b>COD PROJECT MANAGEMENT</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Execute Scope Management/Change Control Processes	Determine scope for COD and identify plans to handle requirements that are identified out of scope.		✓	
Update Project Plan and Create New Baseline	Activity to update tasks, dates, resources, and completion percentage in COD project plan.		✓	
Coordinate Move to new SFA Building	Time allocated to move project site to SFA's new building scheduled for Summer 2001.		✓	



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### **1.1.2. COD Development Phase**

#### **1.1.2.1 Analysis Stage**

The work in the Capability Analysis stage concentrates on defining the business requirements, performance targets, and delivery options necessary to define and commit to a specific implementation plan.

<b>SET MILESTONE REVIEW CRITERIA</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Set the checkpoints to review work with SFA in order to demonstrate the progress the COD project team is making toward successful completion of this stage.		✓	✓	✓

<b>CHANGE READINESS ASSESSMENT</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Team assesses how the sponsoring organization currently operates, its strengths as well as its weaknesses, constraints, and associated risks for any change journey.			✓	

<b>SYSTEM REQUIREMENTS ANALYSIS</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Design Business Processes, Skills, and User Interaction	This task package is used to design the new business processes and define how they will interact with the workforce (skills), applications (application interaction), and physical environment. Activities are used to capture the interactions among business processes, human performance, application, physical environment, and technology infrastructure.	✓	✓	✓
Assess Deployment Environment	The objectives of this assessment are to consider the geographical, infrastructure, operational, and cultural differences between the current structure of the sponsoring organization and the desired structure, to define the deployment requirements, and to determine the optimal deployment units. This task package will provide a major input to estimating the design, build and test, and deployment efforts.		✓	✓



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<b>SYSTEM REQUIREMENTS ANALYSIS</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Determine Deployment Approach	Select options regarding the structure of specific parts of the business capability and its implementation.	✓	✓	✓

<b>SFA IV&amp;V SYSTEM REQUIREMENTS REVIEW</b>				
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>	
Follows SFA's guidelines for Independent Verification and Validation of System Requirements.	✓	✓	✓	

<b>SFA APPROVAL OF SYSTEM REQUIREMENTS</b>				
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>	
Milestone to mark the approval of system requirements through completion of the IV&V review.				

<b>UPDATE BUSINESS CASE</b>				
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>	
Update the business case submitted at the end of Phase II based on work performed in the analysis stage.		✓	✓	

<b>UPDATE IMPLEMENTATION PLAN AND PERFORMANCE METRICS</b>				
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>	
Update the implementation plan that considers constraints, program interdependencies, strategic timelines, and milestones. Update the associated assumptions, costs, and the approach to test the benefits realization.	✓	✓	✓	

<b>DELIVER AND HAVE SFA AUTHORIZE SHARED-IN-SAVINGS PLAN</b>				
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>	
Deliver shared-in-savings deal for COD.		✓		



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### 1.1.2.2 Design Stage

PRELIMINARY SYSTEM DESIGN STAGE				
Task	Description	SFA	MP	CSP
Set Milestone Review Criteria	Set the checkpoints to review work with SFA in order to demonstrate the progress the COD project team is making toward successful completion of this stage.	✓	✓	✓
Identify Application Requirements	Identify requirements for the COD application. This entails analyzing elements of the current Business Process Design, and understanding the business processes, the requirements from the stakeholders (e.g., employees, application users, customers, suppliers, sponsors), the usability requirements, the required performance of the product in the organization, and the required performance support for the stakeholders.	✓	✓	
Design Application Architecture	Design the COD application and help ensure the conceptual integrity of the application among multiple design, build, and maintenance teams. Making and documenting overall design decisions, including the application interfaces, helps ensure that the application will meet its quality requirements. Also, develop an approach and a plan for integration testing to ensure that the application architecture is successfully implemented and meets the quality requirements.			✓
Design Database	Transform the Data Model into logical and physical database designs which optimize the performance and reliability of the application, and ensure that all data requirements are identified and will be met during application conversion. The data conversion processes created in this task package will be used in the overall migration and roll-out of the application.	✓	✓	✓
Update Deployment Approach	Update Deployment Requirements based on work performed during the Preliminary Design Stage.	✓	✓	✓



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PRELIMINARY SYSTEM DESIGN STAGE				
Task	Description	SFA	MP	CSP
Document Testing Approach	Document approach for performing unit, integration, performance and stress, and acceptance testing.	✓	✓	✓
Document Data Cleansing and Conversion Approach	Document approach for converting historical as well as 2001 - 2002 award year data for RFMS and LOS.	✓	✓	✓
SFA IV&V Preliminary Design Review	Follows SFA's guidelines for Independent Verification and Validation of Preliminary Design.	✓	✓	✓
SFA Approval of Preliminary Design Stage	Milestone to mark the approval of Preliminary Design through completion of the IV&V review.			

DESIGN ORGANIZATION STRUCTURE, TRAINING & COMMUNICATIONS				
Task	Description	SFA	MP	CSP
Design Organization Infrastructure	Calculate the staffing needs and provide an approach for filling the necessary positions.		✓	
Design Training Infrastructure	Define training and performance support, and design products and a delivery approach for the training, performance, and support products.		✓	
Design Communications Program	Development of the communications relating to Common Process to both internal and external audiences (involves developing the plan, calendar, and the communication vehicles).		✓	



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<b>DESIGN AND PLAN PHYSICAL ENVIRONMENT</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Identify and resolve overall design and planning issues related to the physical environment that will form an integral part of the new capability. Typical issues involve balancing benefits, costs, schedule, quality, regulations, and functional requirements. Define, collate, and agree on all design requirements; develop options and final designs; obtain approvals; specify acquisition and deployment needs; assess realization costs; and create detailed implementation plans for deployment of the physical environment designs. Where applicable, requirements for decommissioning and disposal of surplus assets are also addressed here.	✓	✓	✓

<b>DESIGN TECHNOLOGY INFRASTRUCTURE</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Design the components of the Technology Infrastructure, including the Execution, Development, and Operations Architectures. Also design the network, communication, and computing platforms. Coordinate the work within this major activity with the development of the information technology (IT) processes and organizational changes required to support the new infrastructure. Also includes a Peer Review of Execution, Development, & Operations Architecture Design.	✓	✓	✓

<b>SFA IV&amp;V DESIGN REVIEW OF TECHNOLOGY INFRASTRUCTURE DESIGN</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Follows SFA's guidelines for Independent Verification and Validation of Technology Infrastructure.	✓	✓	✓

<b>SFA APPROVAL OF TECHNICAL INFRASTRUCTURE DESIGN</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Milestone to mark the approval of Technical Infrastructure through completion of the IV&V review.			





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### 1.1.2.3 Build and Test of the Common and Middleware

DETAILED SYSTEM DESIGN OF MIDDLEWARE				
Task	Description	SFA	MP	CSP
Set Milestone Review Criteria	Set the checkpoints to review work with SFA in order to demonstrate the progress the COD project team is making toward successful completion of this stage.	✓	✓	✓
Analyze Application Requirements for Connecting to the Enterprise Application Integration Software	Develop a formal and rigorous model of the previously gathered requirements. The project team creates cohesive models of the application (event, process, content, and data) and establishes metrics and goals that can be verified with stakeholders for each model. When open issues remain, actively manage them to an agreed conclusion.	✓	✓	✓
Perform Application Detailed Design	Produce completed detailed design specifications that can be directly implemented in code, and develop the approach and plan for unit testing the application's modules	✓	✓	✓
Peer Review of Application Detailed Design	Andersen Consulting employee overlooks document to ensure quality.		✓	
Define Application Architecture	Design the application to help ensure the conceptual integrity of the application among multiple design, build, and maintenance teams. Making and documenting overall design decisions, including the application interfaces, helps ensure that the application will meet its quality requirements.	✓	✓	
Plan Integration Test	Develop the approach and the plan that will be used to organize and execute the integration test. The objective of integration testing is to ensure that related components function properly when assembled into dialogs or batch strings, and to verify that the component interfaces have appropriately implemented the design.	✓	✓	



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DETAILED SYSTEM DESIGN OF MIDDLEWARE				
Task	Description	SFA	MP	CSP
Plan Performance Test	Develop a performance test approach, identify performance test conditions, develop performance test cycles, and verify performance test plan.	✓	✓	
Verify & Validate Application Quality	Ensure that the total collection of designs (or specifications) is consistent with the requirements. This process helps ensure that the current and future design work products are produced as planned.	✓	✓	✓
SFA IV&V Critical Design Review	Follows SFA's guidelines for Independent Verification and Validation of Detailed Design.	✓	✓	✓
SFA Approval of Design Stage	Milestone to mark the approval of Detailed Design through completion of the IV&V review.			

PLAN OPERATIONAL READINESS TEST				
Description	SFA	MP	CSP	
Ensure that the middleware can be correctly deployed and operated within the enterprise. The operational readiness test plans created will cover all types of operating locations that will receive the business capability. Implementing the tests will mitigate the risks associated with transferring the business capability into production.	✓	✓	✓	

ACQUIRE PHYSICAL ENVIRONMENT ASSETS & SERVICES				
Description	SFA	MP	CSP	
Establish the high speed communications link between the COD solution partner(s) and the VDC for both development and production environments for COD.	✓	✓	✓	



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<b>BUILD &amp; TEST TECHNOLOGY INFRASTRUCTURE</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Acquire, develop, and test the Technology Infrastructure. The task packages within this major activity implement the additions and extensions to the Execution, Development, and Operations Architectures. Develop the Physical Network and Computing Resources, and test them as a unified product prior to the Application Product Test. These tests should include changes to information technology (IT) processes and organization to ensure improvements to the organization's technology capability.	✓	✓	✓

<b>SFA IV&amp;V REVIEW OF INTEGRATION TEST OF TECHNOLOGY INFRASTRUCTURE</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Follows SFA's guidelines for Independent Verification and Validation Readiness for Integration Test of the Technology Infrastructure.	✓	✓	✓

<b>BUILD &amp; TEST MIDDLEWARE TO CREATE THE COMMON RECORD</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Build & Test Application	Build and unit test the programs that will convert legacy record formats into the Common Record format.	✓	✓	✓
Develop Training Courses	Define detailed learning objectives, determine learning context, and design learning activities. Review paper-based learning product prototypes for ease of use. Develop activities and content, and define the support that learners will require. Prepare and execute testing to ensure that each learning product meets the stated objectives and that instructors are effective when using the learning products. Translate the learning approach and learning requirements into finalized learning products.		✓	



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<b>BUILD &amp; TEST MIDDLEWARE TO CREATE THE COMMON RECORD</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Design User Procedures, References, & Job Aids	Produce a finalized, detailed set of new Business Policies, Business Procedures, User Procedures, and Reference Material. Define the policies and performance support structure, standards, and templates. Create prototypes for all policies, procedures, reference materials, and job aids. Conduct a usability test and review to verify ease of use. Document Business Policies and Procedures using capability designs. Document User Procedures in enough detail to enable smooth execution of new application-related tasks within a given Business Procedure. Document reference materials and job aids. Validate and test the content and usability of the policies, procedures, and performance support.		✓	

<b>DEVELOP &amp; DEPLOY RECORD RELATING TO COMMON RECORD</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Development of the communications relating to Common Record to both internal and external audiences (involves developing the plan, calendar, and the communication vehicles).			✓	

<b>DEVELOP DEPLOYMENT PROCEDURES RELATING TO COMMON RECORD</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Update Deployment Requirements based on work performed for developing the Common Record.		✓	✓	✓

<b>SFA IV&amp;V INTEGRATION TEST READINESS REVIEW</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Follows SFA's guidelines for Independent Verification and Validation of the Integration Test plan.		✓	✓	



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SFA APPROVAL FOR INTEGRATION TEST			
Description	SFA	MP	CSP
Milestone to mark the approval of Integration Test through completion of the IV&V review.			

PERFORM INTEGRATION TEST OF MIDDLEWARE				
Task	Description	SFA	MP	CSP
Execute Integration Test	Integrate modules and verify that their interfaces and interdependencies are correctly designed and implemented.	✓	✓	
Execute Performance Test	Conduct a performance test and track and manage fixes.	✓	✓	

CONDUCT PRODUCTION READINESS REVIEWS FOR COD MIDDLEWARE			
Description	SFA	MP	CSP
Follow SFA's Production Readiness Review process to obtain approval to move COD into production.	✓	✓	✓

SFA APPROVAL TO DEPLOY MIDDLEWARE			
Description	SFA	MP	CSP
Milestone to mark the approval of Production Readiness through completion of the IV&V review.			

DEPLOY MIDDLEWARE TO CREATE THE COMMON RECORD FROM INCOMING LEGACY RECORDS			
Description	SFA	MP	CSP
Deploy the middleware that will intercept and copy incoming legacy records, transform them into the Common Record format, and save them as a repository of test records for unit, integration, performance and stress, and acceptance testing.	✓	✓	✓



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### 1.1.2.4 Build and Test of the Common Process

DETAILED SYSTEM DESIGN				
Task	Description	SFA	MP	CSP
Set Milestone Review Criteria	Set the checkpoints to review work with SFA in order to demonstrate the progress the COD project team is making toward successful completion of this stage.	✓	✓	✓
Design & Evaluate User Interaction Model	Translate business processes, capability interaction, usability objectives, and usability requirements into a User Interaction Model. Design how the users will interact with the applications, and how the applications will be integrated into the workflow. Also define the overall approach for detailed user interface development. Will create a design and evaluation approach for user interface development, and develop user interface standards and guidelines that are based on user interaction.	✓	✓	✓
Analyze Application Requirements	Develop a formal and rigorous model of the previously gathered requirements. The project team creates cohesive models of the application (event, process, content, and data) and establishes metrics and goals that can be verified with stakeholders for each model. When open issues remain, actively manage them to an agreed conclusion.	✓	✓	✓
Design & Evaluate User Interface	Design and test the specific details of the user interface, building. User interface details include dialogs or conversations, window screens or pages, forms, reports, and possibly user interface hardware (monitors, input devices). Design and evaluate forms and reports. Finally, perform one or more high-fidelity usability evaluations.	✓	✓	✓
Perform Application Detailed Design	Produce completed detailed design specifications that can be directly implemented in code, and develop the approach and plan for component testing the application's modules.	✓	✓	✓



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DETAILED SYSTEM DESIGN				
Task	Description	SFA	MP	CSP
Peer Review of Application Detailed Design	Modernization Partner resource who overlooks document to ensure quality.		✓	
Design Application Architecture	Design the application and to help ensure the conceptual integrity of the application among multiple design, build, and maintenance teams. Making and documenting overall design decisions, including the application interfaces, helps ensure that the application will meet its quality requirements.			✓
Plan Integration Test	Develop the approach and the plan that will be used to organize and execute the integration test. The objective of integration testing is to ensure that related components function properly when assembled into dialogs or batch strings, and to verify that the component interfaces have appropriately implemented the design.	✓	✓	✓
Plan Performance Test	Develop a performance test approach, identify performance test conditions, develop performance test cycles, and verify performance test plan.	✓	✓	✓
Design Database	Transform the Data Model into logical and physical database designs which optimize the performance and reliability of the application, and ensure that all data requirements are identified and will be met during application conversion. The data conversion processes created in this task package will be used in the overall migration and roll-out of the application.	✓	✓	✓
Verify & Validate Application Quality	Ensure that the total collection of designs (or specifications) is consistent with the requirements. This process helps ensure that the current and future design work products are produced as planned.	✓	✓	
SFA IV&V Critical Design Review	Follows SFA's guidelines for Independent Verification and Validation of Detailed Design.	✓	✓	✓



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<b>DETAILED SYSTEM DESIGN</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
SFA Approval of Design Stage	Milestone to mark the approval of Detailed Design through completion of the IV&V review.			

<b>BUILD &amp; TEST APPLICATION &amp; PERFORMANCE SUPPORT</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Build & Test Application	Build a complete, high-quality software application from the Application Detailed Design document. Have programmers implement the modules and then review the coded modules to verify correctness.		✓	✓
Develop Learning Courses	Define detailed learning objectives, determine learning context, and design learning activities. Review paper-based learning product prototypes for ease of use. Develop activities and content, and define the support that learners will require. Prepare and execute testing to ensure that each learning product meets the stated objectives and that instructors are effective when using the learning products. Translate the learning approach and learning requirements into finalized learning products.		✓	





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<b>BUILD &amp; TEST APPLICATION &amp; PERFORMANCE SUPPORT</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Design User Procedures, References, & Job Aids	Produce a finalized, detailed set of new Business Policies, Business Procedures, User Procedures, and Reference Material. Define the policies and performance support structure, standards, and templates. Create prototypes for all policies, procedures, reference materials, and job aids. Conduct a usability test and review to verify ease of use. Document Business Policies and Procedures using capability designs. Document User Procedures in enough detail to enable smooth execution of new application-related tasks within a given Business Procedure. Document reference materials and job aids. Validate and test the content and usability of the policies, procedures, and performance support.		✓	

<b>DEVELOP &amp; DEPLOY COMMUNICATIONS RELATING TO COMMON PROCESS</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Development of the communications relating to Common Process to both internal and external audiences (involves developing the plan, calendar, and the communication vehicles).			✓	

<b>DEVELOP DEPLOYMENT PROCEDURES RELATING TO COMMON PROCESS</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Update Deployment Requirements based on work performed for developing the Common Process.		✓	✓	✓

<b>SFA IV&amp;V INTEGRATION TEST READINESS REVIEW</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Follows SFA's guidelines for Independent Verification and Validation of the Integration Test plan.		✓	✓	



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SFA APPROVAL OF INTERGRATION TEST				
Description	SFA	MP	CSP	
Milestone to mark the approval of Integration Test through completion of the IV&V review.				

PERFORM INTEGRATION TEST OF COMMON PROCESS				
Task	Description	SFA	MP	CSP
Execute Integration Test	Integrate modules and verify that their interfaces and interdependencies are correctly designed and implemented.	✓	✓	✓
Execute Performance Test	Conduct a performance test and track and manage fixes.	✓	✓	✓
Plan Acceptance Test	Develop a comprehensive approach for the acceptance test. Create and verify the test plan (conditions and cycles).	✓	✓	✓
SFA IV&V Acceptance Test Readiness Review	Follows SFA's guidelines for Independent Verification and Validation of the Acceptance Test plan.	✓	✓	
SFA Approval for Acceptance Test	Milestone to mark the approval of Acceptance Test Readiness through completion of the IV&V review.			

PERFORM ACCEPTANCE TEST OF COMMON PROCESS				
Task	Description	SFA	MP	CSP
Prepare & Execute Acceptance Test	Create the acceptance test scripts from the test conditions and cycles. Test the new application before it moves into production; review the test results and monitor the application's performance. Investigate discrepancies between the actual and the expected results, and take appropriate steps to resolve those discrepancies. Complete a comprehensive model for the application product test. Verify, before conversion, that the new application meets requirements as defined.	✓	✓	✓

### 1.1.2.5 Build and Test of Fund Accountability and Management



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DETAILED SYSTEM DESIGN				
Task	Description	SFA	MP	CSP
Set Milestone Review Criteria	Set the checkpoints to review work with SFA in order to demonstrate the progress the COD project team is making toward successful completion of this stage.	✓	✓	✓
Design & Evaluate User Interaction Model	Translate business processes, capability interaction, usability objectives, and usability requirements into a User Interaction Model. Design how the users will interact with the applications, and how the applications will be integrated into the workflow. Also define the overall approach for detailed user interface development. Will create a design and evaluation approach for user interface development, and develop user interface standards and guidelines that are based on user interaction.	✓	✓	✓
Analyze Application Requirements	Develop a formal and rigorous model of the previously gathered requirements. The project team creates cohesive models of the application (event, process, content, and data) and establishes metrics and goals that can be verified with stakeholders for each model. When open issues remain, actively manage them to an agreed conclusion.	✓	✓	✓
Design & Evaluate User Interface	Design and test the specific details of the user interface, building. User interface details include dialogs or conversations, window screens or pages, forms, reports, and possibly user interface hardware (monitors, input devices). Design and evaluate forms and reports. Finally, perform one or more high-fidelity usability evaluations.	✓	✓	✓
Perform Application Detailed Design	Produce completed detailed design specifications that can be directly implemented in code, and develop the approach and plan for unit testing the application's modules.	✓	✓	✓



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DETAILED SYSTEM DESIGN				
Task	Description	SFA	MP	CSP
Peer Review of Application Detailed Design	Modernization Partner resource who overlooks document to ensure quality.		✓	
Design Application Architecture	Design the application and to help ensure the conceptual integrity of the application among multiple design, build, and maintenance teams. Making and documenting overall design decisions, including the application interfaces, helps ensure that the application will meet its quality requirements.			✓
Plan Integration Test	Develop the approach and the plan that will be used to organize and execute the integration test. The objective of integration testing is to ensure that related components function properly when assembled into dialogs or batch strings, and to verify that the component interfaces have appropriately implemented the design.	✓	✓	✓
Plan Performance Test	Develop a performance test approach, identify performance test conditions, develop performance test cycles, and verify performance test plan.	✓	✓	✓
Design Database	Transform the Data Model into logical and physical database designs which optimize the performance and reliability of the application, and ensure that all data requirements are identified and will be met during application conversion. The data conversion processes created in this task package will be used in the overall migration and roll-out of the application.	✓	✓	✓
Verify & Validate Application Quality	Ensure that the total collection of designs (or specifications) is consistent with the requirements. This process helps ensure that the current and future design work products are produced as planned.	✓	✓	
SFA IV&V Critical Design Review	Follows SFA's guidelines for Independent Verification and Validation of Detailed Design.	✓	✓	✓



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DETAILED SYSTEM DESIGN				
Task	Description	SFA	MP	CSP
SFA Approval of Design Stage	Milestone to mark the approval of Detailed Design through completion of the IV&V review.			

BUILD & TEST APPLICATION & PERFORMANCE SUPPORT				
Task	Description	SFA	MP	CSP
Build & Test Application	Build a complete, high-quality software application from the Application Detailed Design document. Have programmers implement the modules and then review the coded modules to verify correctness.		✓	✓
Develop Training Courses	Define detailed learning objectives, determine learning context, and design learning activities. Review paper-based learning product prototypes for ease of use. Develop activities and content, and define the support that learners will require. Prepare and execute testing to ensure that each learning product meets the stated objectives and that instructors are effective when using the learning products. Translate the learning approach and learning requirements into finalized learning products.		✓	



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<b>BUILD &amp; TEST APPLICATION &amp; PERFORMANCE SUPPORT</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Design User Procedures, References, & Job Aids	Produce a finalized, detailed set of new Business Policies, Business Procedures, User Procedures, and Reference Material. Define the policies and performance support structure, standards, and templates. Create prototypes for all policies, procedures, reference materials, and job aids. Conduct a usability test and review to verify ease of use. Document Business Policies and Procedures using capability designs. Document User Procedures in enough detail to enable smooth execution of new application-related tasks within a given Business Procedure. Document reference materials and job aids. Validate and test the content and usability of the policies, procedures, and performance support.		✓	

<b>DEVELOP &amp; DEPLOY COMMUNICATIONS RELATING TO FUND ACCOUNTABILITY &amp; MANAGEMENT</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Development of the communications relating to Fund Accountability and Management to both internal and external audiences (involves developing the plan, calendar, and the communication vehicles).			✓	

<b>DEVELOP DEPLOYMENT PROCEDURES RELATING TO FUND ACCOUNTABILITY &amp; MANAGEMENT</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Update Deployment Requirements based on work performed for developing the Fund Accountability and Management.		✓	✓	✓

<b>SFA IV&amp;V INTEGRATION TEST READINESS REVIEW</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Follows SFA's guidelines for Independent Verification and Validation of the Integration Test plan.		✓	✓	



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<b>SFA APPROVAL FOR INTEGRATION TEST</b>				
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>	
Milestone to mark the approval of Integration Test Readiness through completion of the IV&V review.				

<b>PERFORM INTEGRATION TEST OF FUND ACCOUNTABILITY &amp; MANAGEMENT</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Execute Integration Test	Integrate modules and verify that their interfaces and interdependencies are correctly designed and implemented.	✓	✓	✓
Execute Performance Test	Conduct a performance test to track and manage fixes.	✓	✓	✓
Plan Acceptance Test	Develop a comprehensive approach for the acceptance test. Create and verify the test plan (conditions and cycles).		✓	✓
SFA IV&V Acceptance Test Readiness Review	Follows SFA's guidelines for Independent Verification and Validation of the Acceptance Test plan.	✓	✓	
SFA Approval for Acceptance Test	Milestone to mark the approval of Acceptance Test Readiness through completion of the IV&V review.			

<b>PERFORM ACCEPTANCE TEST OF FUND ACCOUNTABILITY &amp; MANAGEMENT</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Prepare & Execute Acceptance Test	Create the acceptance test scripts from the test conditions and cycles. Test the new application before it moves into production; review the test results and monitor the application's performance. Investigate discrepancies between the actual and the expected results, and take appropriate steps to resolve those discrepancies. Complete a comprehensive model for the acceptance test. Verify, before conversion, that the new application meets requirements as defined.	✓	✓	✓

### 1.1.2.6 Build and Test On-Line Access functionality



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DETAILED SYSTEM DESIGN				
Task	Description	SFA	MP	CSP
Set Milestone Review Criteria	Set the checkpoints to review work with SFA in order to demonstrate the progress the COD project team is making toward successful completion of this stage.	✓	✓	✓
Design & Evaluate User Interaction Model	Translate business processes, capability interaction, usability objectives, and usability requirements into a User Interaction Model. Design how the users will interact with the applications, and how the applications will be integrated into the workflow. Also define the overall approach for detailed user interface development. Will create a design and evaluation approach for user interface development, and develop user interface standards and guidelines that are based on user interaction.	✓	✓	✓
Analyze Application Requirements	Develop a formal and rigorous model of the previously gathered requirements. The project team creates cohesive models of the application (event, process, content, and data) and establishes metrics and goals that can be verified with stakeholders for each model. When open issues remain, actively manage them to an agreed conclusion.	✓	✓	✓
Design & Evaluate User Interface	Design and test the specific details of the user interface, building. User interface details include dialogs or conversations, window screens or pages, forms, reports, and possibly user interface hardware (monitors, input devices). Design and evaluate forms and reports. Finally, perform one or more high-fidelity usability evaluations.	✓	✓	✓
Perform Application Detailed Design	Produce completed detailed design specifications that can be directly implemented in code, and develop the approach and plan for unit testing the application's modules	✓	✓	✓





## APPENDIX B

DETAILED SYSTEM DESIGN				
Task	Description	SFA	MP	CSP
Peer Review of Application Detailed Design	Modernization Partner resource who overlooks document to ensure quality.		✓	
Design Application Architecture	Design the application and to help ensure the conceptual integrity of the application among multiple design, build, and maintenance teams. Making and documenting overall design decisions, including the application interfaces, helps ensure that the application will meet its quality requirements.			✓
Plan Integration Test	Develop the approach and the plan that will be used to organize and execute the integration test. The objective of integration testing is to ensure that related components function properly when assembled into dialogs or batch strings, and to verify that the component interfaces have appropriately implemented the design.	✓	✓	✓
Plan Performance Test	Develop a performance test approach, identify performance test conditions, develop performance test cycles, and verify performance test plan.	✓	✓	✓
Design Database	Transform the Data Model into logical and physical database designs which optimize the performance and reliability of the application, and ensure that all data requirements are identified and will be met during application conversion. The data conversion processes created in this task package will be used in the overall migration and roll-out of the application.	✓	✓	✓
Verify & Validate Application Quality	Ensure that the total collection of designs (or specifications) is consistent with the requirements. This process helps ensure that the current and future design work products are produced as planned.	✓	✓	
SFA IV&V Critical Design Review	Follows SFA's guidelines for Independent Verification and Validation of Detailed Design.	✓	✓	✓



## APPENDIX B

DETAILED SYSTEM DESIGN				
Task	Description	SFA	MP	CSP
SFA Approval of Design Stage	Milestone to mark the approval of Detailed Design through completion of the IV&V review.			

BUILD & TEST APPLICATION & PERFORMANCE SUPPORT				
Task	Description	SFA	MP	CSP
Build & Test Application	Build a complete, high-quality software application from the Application Detailed Design document. Have programmers implement the modules and then review the coded modules to verify correctness.		✓	✓
Develop Training Courses	Define detailed learning objectives, determine learning context, and design learning activities. Review paper-based learning product prototypes for ease of use. Develop activities and content, and define the support that learners will require. Prepare and execute testing to ensure that each learning product meets the stated objectives and that instructors are effective when using the learning products. Translate the learning approach and learning requirements into finalized learning products.		✓	



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<b>BUILD &amp; TEST APPLICATION &amp; PERFORMANCE SUPPORT</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Design User Procedures, References, & Job Aids	Produce a finalized, detailed set of new Business Policies, Business Procedures, User Procedures, and Reference Material. Define the policies and performance support structure, standards, and templates. Create prototypes for all policies, procedures, reference materials, and job aids. Conduct a usability test and review to verify ease of use. Document Business Policies and Procedures using capability designs. Document User Procedures in enough detail to enable smooth execution of new application-related tasks within a given Business Procedure. Document reference materials and job aids. Validate and test the content and usability of the policies, procedures, and performance support.		✓	

<b>DEVELOP &amp; DEPLOY COMMUNICATIONS RELATING TO ON-LINE ACCESS</b>				
	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
	Development of the communications relating to On-Line Access to both internal and external audiences (involves developing the plan, calendar, and the communication vehicles).		✓	

<b>DEVELOP DEPLOYMENT PROCEDURES RELATING TO ON-LINE ACCESS</b>				
	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
	Update Deployment Requirements based on work performed for developing the On-Line Access.	✓	✓	✓

<b>SFA IV&amp;V INTEGRATION TEST READINESS REVIEW</b>				
	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
	Follows SFA's guidelines for Independent Verification and Validation of the Integration Test plan.	✓	✓	



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<b>SFA APPROVAL FOR INTEGRATION TEST</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Milestone to mark the approval of Integration Test through completion of the IV&V review.				

<b>PERFORM INTEGRATION TEST OF ON-LINE ACCESS</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Execute Integration Test	Integrate modules and verify that their interfaces and interdependencies are correctly designed and implemented.	✓	✓	✓
Execute Performance Test	Conduct a performance test to track and manage fixes.	✓	✓	✓
Plan Acceptance Test	Develop a comprehensive approach for the acceptance test. Create and verify the test plan (conditions and cycles).		✓	✓
SFA IV&V Acceptance Test Readiness Review	Follows SFA's guidelines for Independent Verification and Validation of the Acceptance Test plan.	✓	✓	
SFA Approval for Acceptance Test	Milestone to mark the approval of Acceptance Test Readiness through completion of the IV&V review.			

<b>PERFORM ACCEPTANCE TEST OF ON-LINE ACCESS</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Prepare & Execute Acceptance Test	Create the acceptance test scripts from the test conditions and cycles. Test the new application before it moves into production; review the test results and monitor the application's performance. Investigate discrepancies between the actual and the expected results, and take appropriate steps to resolve those discrepancies. Complete a comprehensive model for the acceptance test. Verify, before conversion, that the new application meets requirements as defined.	✓	✓	✓



## APPENDIX B

### 1.1.2.7 Build and Test of Common Customer Service functionality

DETAILED SYSTEM DESIGN				
Task	Description	SFA	MP	CSP
Set Milestone Review Criteria	Set the checkpoints to review work with SFA in order to demonstrate the progress the COD project team is making toward successful completion of this stage.	✓	✓	✓
Design & Evaluate User Interaction Model	Translate business processes, capability interaction, usability objectives, and usability requirements into a User Interaction Model. Design how the users will interact with the applications, and how the applications will be integrated into the workflow. Also define the overall approach for detailed user interface development. Will create a design and evaluation approach for user interface development, and develop user interface standards and guidelines that are based on user interaction.	✓	✓	✓
Analyze Application Requirements	Develop a formal and rigorous model of the previously gathered requirements. The project team creates cohesive models of the application (event, process, content, and data) and establishes metrics and goals that can be verified with stakeholders for each model. When open issues remain, actively manage them to an agreed conclusion.	✓	✓	✓
Design & Evaluate User Interface	Design and test the specific details of the user interface, building. User interface details include dialogs or conversations, window screens or pages, forms, reports, and possibly user interface hardware (monitors, input devices). Design and evaluate forms and reports. Finally, perform one or more high-fidelity usability evaluations.	✓	✓	✓
Perform Application Detailed Design	Produce completed detailed design specifications that can be directly implemented in code, and develop the approach and plan for unit testing the application's modules	✓	✓	✓



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DETAILED SYSTEM DESIGN				
Task	Description	SFA	MP	CSP
Peer Review of Application Detailed Design	Modernization Partner resource who overlooks document to ensure quality.		✓	
Design Application Architecture	Design the application and to help ensure the conceptual integrity of the application among multiple design, build, and maintenance teams. Making and documenting overall design decisions, including the application interfaces, helps ensure that the application will meet its quality requirements.			✓
Plan Integration Test	Develop the approach and the plan that will be used to organize and execute the integration test. The objective of integration testing is to ensure that related components function properly when assembled into dialogs or batch strings, and to verify that the component interfaces have appropriately implemented the design.	✓	✓	✓
Plan Performance Test	Develop a performance test approach, identify performance test conditions, develop performance test cycles, and verify performance test plan.	✓	✓	✓
Design Database	Transform the Data Model into logical and physical database designs which optimize the performance and reliability of the application, and ensure that all data requirements are identified and will be met during application conversion. The data conversion processes created in this task package will be used in the overall migration and roll-out of the application.	✓	✓	✓
Verify & Validate Application Quality	Ensure that the total collection of designs (or specifications) is consistent with the requirements. This process helps ensure that the current and future design work products are produced as planned.	✓	✓	
SFA IV&V Critical Design Review	Follows SFA's guidelines for Independent Verification and Validation of Detailed Design.	✓	✓	✓



## APPENDIX B

DETAILED SYSTEM DESIGN				
Task	Description	SFA	MP	CSP
SFA Approval of Design Stage	Milestone to mark the approval of Detailed Design through completion of the IV&V review.			

BUILD & TEST APPLICATION & PERFORMANCE SUPPORT				
Task	Description	SFA	MP	CSP
Build & Test Application	Build a complete, high-quality software application from the Application Detailed Design document. Have programmers implement the modules and then review the coded modules to verify correctness.		✓	✓
Develop Training Courses	Define detailed learning objectives, determine learning context, and design learning activities. Review paper-based learning product prototypes for ease of use. Develop activities and content, and define the support that learners will require. Prepare and execute testing to ensure that each learning product meets the stated objectives and that instructors are effective when using the learning products. Translate the learning approach and learning requirements into finalized learning products.		✓	



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<b>BUILD &amp; TEST APPLICATION &amp; PERFORMANCE SUPPORT</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Design User Procedures, References, & Job Aids	Produce a finalized, detailed set of new Business Policies, Business Procedures, User Procedures, and Reference Material. Define the policies and performance support structure, standards, and templates. Create prototypes for all policies, procedures, reference materials, and job aids. Conduct a usability test and review to verify ease of use. Document Business Policies and Procedures using capability designs. Document User Procedures in enough detail to enable smooth execution of new application-related tasks within a given Business Procedure. Document reference materials and job aids. Validate and test the content and usability of the policies, procedures, and performance support.		✓	

<b>DEVELOP &amp; DEPLOY COMMUNICATIONS RELATING TO CUSTOMER SERVICE</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Development of the communications relating to Common Customer Service to both internal and external audiences (involves developing the plan, calendar, and the communication vehicles).			✓	

<b>DEVELOP DEPLOYMENT PROCEDURES RELATING TO CUSTOMER SERVICE</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Update Deployment Requirements based on work performed for developing the Common Customer Service.		✓	✓	✓





## APPENDIX B

<b>ACQUIRE PHYSICAL ENVIRONMENT ASSETS &amp; SERVICES</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Begin procurement for a high-speed connection between the COD solution partner(s) facility and the VDC for call center integration.		✓	✓	✓

<b>SFA IV&amp;V INTEGRATION TEST READINESS REVIEW</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Follows SFA's guidelines for Independent Verification and Validation of the Integration Test plan.		✓	✓	

<b>SFA APPROVAL FOR INTEGRATION TEST</b>				
<b>Description</b>		<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Milestone to mark the approval of Integration Test Readiness through completion of the IV&V review.				

<b>PERFORM INTEGRATION TEST OF COMMON CUSTOMER SERVICE</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Execute Integration Test	Integrate modules and verify that their interfaces and interdependencies are correctly designed and implemented.	✓	✓	✓
Execute Performance Test	Conduct a performance test to track and manage fixes.	✓	✓	✓
Plan Acceptance Test	Develop a comprehensive approach for the acceptance test. Create and verify the test plan (conditions and cycles).		✓	✓
SFA IV&V Acceptance Test Readiness Review	Follows SFA's guidelines for Independent Verification and Validation of the Acceptance Test plan.	✓	✓	
SFA Approval for Acceptance Test	Milestone to mark the approval of Acceptance Test Readiness through completion of the IV&V review.			



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<b>PERFORM ACCEPTANCE TEST OF COMMON CUSTOMER SERVICE</b>				
<b>Task</b>	<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Prepare & Execute Acceptance Test	Create the acceptance test scripts from the test conditions and cycles. Test the new application before it moves into production; review the test results and monitor the application's performance. Investigate discrepancies between the actual and the expected results, and take appropriate steps to resolve those discrepancies. Complete a comprehensive model for the acceptance test. Verify, before conversion, that the new application meets requirements as defined.	✓	✓	✓



## APPENDIX B

### 1.1.2.8 Data Conversion

DESIGN DATA CONVERSION PROGRAMS				
Task	Description	SFA	MP	CSP
Set Milestone Review Criteria	Set the checkpoints to review work with SFA in order to demonstrate the progress the COD project team is making toward successful completion of this stage.	✓	✓	✓
Analyze Application Requirements for Performing Data Conversion	Develop a formal and rigorous model of the previously gathered requirements. The project team creates cohesive models of the application (event, process, content, and data) and establishes metrics and goals that can be verified with stakeholders for each model. When open issues remain, actively manage them to an agreed conclusion.			
Perform Application Detailed Design	Produce completed detailed design specifications that can be directly implemented in code, and develop the approach and plan for component testing the application's modules	✓	✓	✓
Design Application Architecture	Design the application and to help ensure the conceptual integrity of the application among multiple design, build, and maintenance teams. Making and documenting overall design decisions, including the application interfaces, helps ensure that the application will meet its quality requirements.	✓	✓	
Plan Performance Test	Develop a performance test approach, identify performance test conditions, develop performance test cycles, and verify performance test plan.	✓	✓	
Verify & Validate Application Quality	Ensure that the total collection of designs (or specifications) is consistent with the requirements. This process helps ensure that the current and future design work products are produced as planned.	✓	✓	✓
SFA IV&V Critical Design Review	Follows SFA's guidelines for Independent Verification and Validation of Detailed Design.	✓	✓	✓



## APPENDIX B

DESIGN DATA CONVERSION PROGRAMS				
Task	Description	SFA	MP	CSP
SFA Approval of Design Stage	Milestone to mark the approval of Detailed Design through completion of the IV&V review.			

BUILD & TEST CONVERSION PROGRAMS				
Task	Description	SFA	MP	CSP
Build & Test Application	Build a complete, high-quality software application from the Application Detailed Design document. Have programmers implement the modules and then review the coded modules to verify correctness.	✓	✓	✓

DEVELOP DATA CONVERSION PROCEDURES				
Description		SFA	MP	CSP
Update Deployment Requirements based on work performed for developing the data conversion programs.				✓

PERFORM INTEGRATION TEST OF DATA CONVERSION				
Task	Description	SFA	MP	CSP
Execute Integration Test	Integrate modules and verify that their interfaces and interdependencies are correctly designed and implemented.	✓	✓	✓
Execute Performance Test	Conduct a performance test to track and manage fixes.	✓	✓	✓



## **APPENDIX B**

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<b>PERFORM DATA CONVERSION OF RFMS &amp; LOS DATA PREVIOUS TO AWARD YEAR 2001-2002</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Convert historical data for RFMS and LOS previous to award year 2001-2002.			✓

<b>PERFORM DATA CONVERSION OF RFMS DATA FOR AWARD YEAR 2001-2002</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Once post-processing for RFMS has ended on September 30, 2002, convert the data for award year 2001-2002 in order to retire the RFMS system.			✓

<b>PERFORM DATA CONVERSION OF LOS DATA FOR AWARD YEAR 2001-2002</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Once post-processing for LOS has ended on June 30, 2003, convert the data for award year 2001-2002 in order to retire the LOS system.			✓



## **APPENDIX B**

### **1.1.3. COD Deployment Phase**

During the System Deployment Stage it is necessary to Assess the Deployment Unit Environment, transition the workforce into New Roles and Responsibilities, deploy the Physical Environment, deploy Business Policies and Procedures, deploy COD Application, deploy production technology infrastructure, activate business capability, and develop and deploy communication relating to system deployment stage.

<b>SET MILESTONE REVIEW CRITERIA</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Set the checkpoints to review work with SFA in order to demonstrate the progress the COD project team is making toward successful completion of this stage.	✓	✓	✓

<b>ASSESS DEPLOYMENT UNIT ENVIRONMENT</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Develop a conversion plan and a work plan to manage the deployment. Assess the progress of the deployment unit's preparation, and develop unit-specific customization requirements and plans to implement them. Determine the customization level required for each local unit.	✓	✓	✓

<b>PLAN OPERATIONAL READINESS TEST</b>			
<b>Description</b>	<b>SFA</b>	<b>MP</b>	<b>CSP</b>
Ensure that COD can be correctly deployed and operated within the enterprise. The operational readiness test plans created will cover all types of operating locations that will receive the business capability. Implementing the tests will mitigate the risks associated with transferring the business capability into production.	✓	✓	✓



## APPENDIX B

TRANSITION WORKFORCE TO NEW ROLES & RESPONSIBILITIES			
Description	SFA	MP	CSP
Evaluate the existing workforce in terms of roles and skills, and perform a gap analysis against the new organization infrastructure for the deployment unit. The gap analysis identifies which roles can be filled by the existing workforce, which workforce resources need to be redeployed, and which gaps can be addressed with training, recruiting, and selection. Train the deployment unit in the implementation and operation of the new business capability		✓	

SETUP EQUIPMENT & SERVICES NEEDED TO SUPPORT CALL CENTER			
Description	SFA	MP	CSP
Manage the implementation of changes to facilities, equipment, and other physical assets needed for the call center.	✓	✓	✓

DEPLOY BUSINESS POLICIES & PROCEDURES			
Description	SFA	MP	CSP
Plan, manage, and control the transition to the new policies and procedures.			

CONDUCT PRODUCTION READINESS REVIEWS FOR COD MIDDLEWARE			
Description	SFA	MP	CSP
Follow SFA's Production Readiness Review process to obtain approval to move COD into production.	✓	✓	✓



## APPENDIX B

DEPLOY PRODUCTION TECHNOLOGY INFRASTRUCTURE			
Description	SFA	MP	CSP
Outline the procedures and considerations for deploying technology infrastructure components at a deployment unit. Address the potential differences in technology infrastructure environments between deployment units. The goal is to bring the deployment unit up to the technology infrastructure baseline required for the business capability. Deployment of the technology infrastructure may include the commissioning and decommissioning of infrastructure components.	✓	✓	✓

DEPLOY COD APPLICATION			
Description	SFA	MP	CSP
Transition the new application and its operating environment into the deployment unit. Establish the data required by the new application; configure the operating environment to the needs of the deployment unit; install the application; configure application parameters needed for the deployment unit; and verify that the application is correct and consistent for the deployment.	✓	✓	✓

EXECUTE OPERATIONAL READINESS TEST			
Description	SFA	MP	CSP
Once COD is moved into the production environment, test the application to ensure that all components were moved over correctly and that the application operates as expected.		✓	✓

COD APPLICATION DEPLOYED			
Description	SFA	MP	CSP
Milestone to mark the completion of deployment of the COD application.			





## APPENDIX B

DEVELOP & DEPLOY COMMUNICATIONS RELATED TO DEPLOYMENT			
Description	SFA	MP	CSP
Development of the communications relating to the deployment of the COD application to both internal and external audiences (involves developing the plan, calendar, and the communication vehicles).		✓	

EVALUATE LESSONS LEARNED			
Description	SFA	MP	CSP
Document Lessons Learned from development and deployment of the COD application.	✓	✓	✓

SFA IV&V POST IMPLEMENTATION REVIEW			
Description	SFA	MP	CSP
Follows SFA's guidelines for Independent Verification and Validation Post Implementation Review.	✓	✓	

RETIRE RECIPIENT FINANCIAL MANAGEMENT SYSTEM			
Description	SFA	MP	CSP
Execute backup and archiving procedures. Collect and file manuals, procedures, and forms. Disable software components.	✓	✓	

RETIRE LOAN ORIGINATION SYSTEM			
Description	SFA	MP	CSP
Execute backup and archiving procedures. Collect and file manuals, procedures, and forms. Disable software components.	✓	✓	